



USDA National Retail Report - Turkey

Advertised Prices for Turkey to Consumers at Major Retail Supermarket Outlets during the period of 03/27 thru 04/02.

(prices in dollars per pound fresh unless otherwise noted; does not reflect all turkey items available in the marketplace)

Fri. Mar 27, 2015

NATIONAL SUMMARY

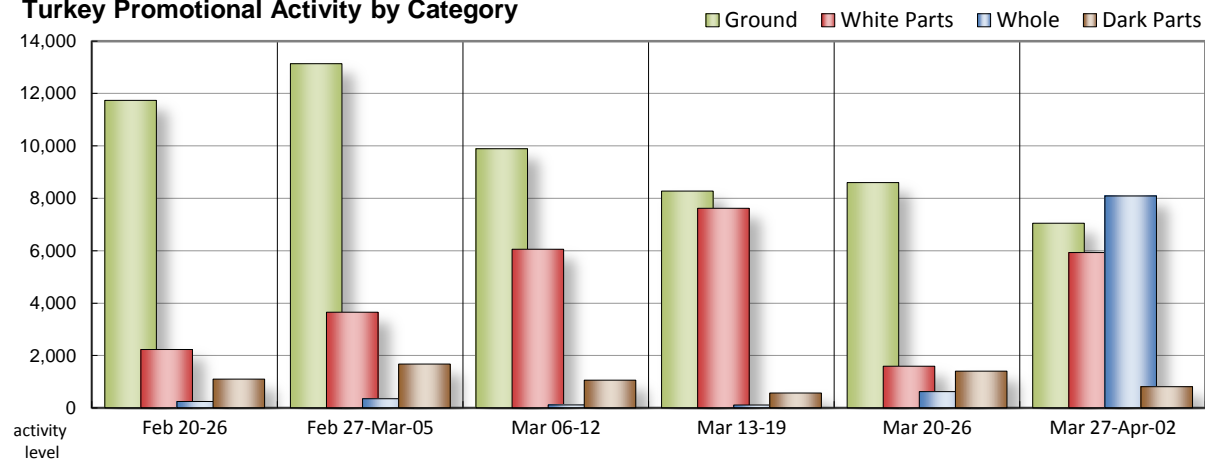
	THIS WEEK		LAST WEEK		LAST YEAR	
Feature Rate ^{1/}	35.6% of 29,100 outlets		28.3% of 29,100 outlets		39.3% of 22,900 outlets	
Special Rate ^{4/}	0.4%		2.3%		3.2%	
Activity Index ^{2/}	24,722		15,898		16,140	
3/	Stores	Wtd Avg	Stores	Wtd Avg	Stores	Wtd Avg
WHOLE BIRDS:						
Fresh - Hens	1,606	1.62	72	1.29		
" - Toms	1,041	1.69				
Frozen - Hens	2,611	1.14	166	1.24	230	1.01
" - Toms	2,827	1.17	381	1.28	190	0.90
PARTS:						
Breast:						
Bone-in, whole						
Fresh	421	2.90	244	2.78		
Frozen	4,236	1.75	511	1.73	1,770	1.72
Split, bone-in						
Fresh	106	1.99	151	2.32		
Rotisserie	121	7.64	16	8.49	100	7.56
Boneless, whole						
Cutlets	149	4.90	477	5.04	1,050	4.79
Cutlets, thin sliced			72	4.59		
Strips						
Tenders	174	4.97			230	4.54
Marinated Tenders	701	4.47	111	3.91	720	4.32
Drumsticks						
Thighs	217	2.26	300	2.16	110	1.87
Wings			178	1.87	10	1.79
Necks	296	2.35	317	2.11	180	2.21
Smoked Drumsticks			77	1.78		
Smoked Wings	94	2.08	172	2.11	150	2.01
Smoked Necks	174	2.31	202	2.03	40	2.15
	26	2.32	154	2.05	20	1.99
GROUND TURKEY:						
Patties	7,045	3.26	8,596	3.70	9,780	3.58
Sausage	946	3.56	365	3.52	990	3.67
85% lean	1,196	3.63	891	3.46	2,040	3.41
93% lean	2,298	2.50	1,631	2.86	1,710	2.61
Breast	2,194	3.54	3,418	3.38	2,920	3.24
Rolls (frsh/frz 1 lb.)	411	4.27	2,291	4.88	2,120	5.07
	606	2.60	659	2.61	30	2.79
Specialty ^{5/}						
Patties	737	5.00	18	3.99	290	4.99
93-94% lean	1,443	4.89	1,687	4.34	550	4.19
Breast	73	6.99	1,331	6.25	690	5.27

Note: rolls & specialty not included in ground turkey total and weighted average.

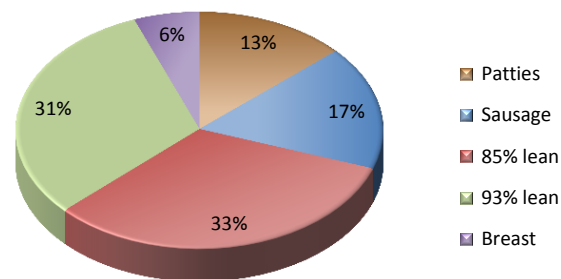
This Week's Turkey Feature Highlights

Feature activity increases as we head into the holiday period. Retailers are showing plenty of turkeys in this week's ads; in fact, whole turkeys are the most actively promoted item this week. Fresh and frozen hens and toms are widely featured, as well as specialty and kosher turkeys. Offerings increase on fresh bone-in breasts; feature activity is sharply higher on frozen bone-in breasts. There is still only limited interest in promoting rotisserie breasts. Featuring increases on boneless white parts due to more ads for marinated tenders. Offerings decline on dark parts; prices are mostly higher. Promotional activity slows on ground turkey; the weighted average price is lower due to a large decline in the number of ads for ground breast. For a change, there are more ads for 85% lean compared to the 93% lean. Deli featuring is slightly less active on service deli, sharply lower on self-service deli. Service deli offerings on private brands outnumber the offerings on processor brands. Prices on self-service deli prices trend higher on 7-10 oz. sizes, lower on 16 oz. sizes.

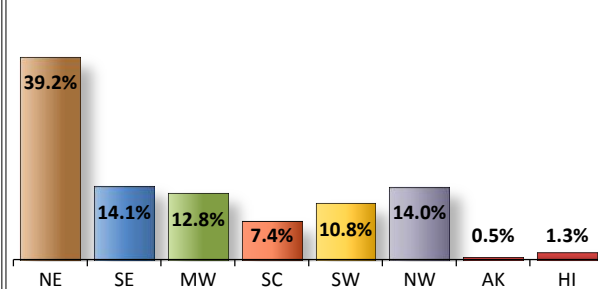
Turkey Promotional Activity by Category



Ground Turkey Featuring by Type



Relative Feature Activity by Region



All report information gathered from publicly available sources including store circulars, newspaper ads, and retailer websites.

1/ Feature Rate: the amount of sampled stores advertising any reported turkey item during the current week, expressed as a percentage of the total sample. **2/ Activity Index:** a measure of the absolute frequency of feature activity equal to the total number of stores for each advertised turkey item (e.g., a retailer with 100 outlets featuring 3 turkey items has an activity index of 300). **3/ Stores/Avg:** the total number of advertising outlets and the weighted average price weighted by the respective number of outlets. **4/ Special Rate:** the percentage of sampled stores with a no-price promotion (e.g., buy 1, get 1 free, etc.). **5/ Specialty:** products produced from birds raised on an all vegetable diet without antibiotics and minimally processed.



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Fri. Mar 27, 2015

	NORTHEAST U.S. (CT,DE,MA,MD,ME,NH,NJ,NY,PA,RI,VT)			SOUTHEAST U.S. (AL,FL,GA,MS,NC,SC,TN,VA,WV)			MIDWEST U.S. (IA,IL,IN,KY,MI,MN,ND,NE,OH,SD,WI)		
Special Rate ^{4/}	55.9% of 5,500 sampled outlets			39.6% of 7,400 sampled outlets			26.9% of 6,100 sampled outlets		
Activity Index ^{2/}	0.0% of stores w/ no-price promotions			0.2% of stores w/ no-price promotions			0.0% of stores w/ no-price promotions		
	Activity Index = 10,989			Activity Index = 5,378			Activity Index = 3,254		
	Price Range (\$/pound)	Summary Stores Wtd Avg		Price Range (\$/pound)	Summary Stores Wtd Avg		Price Range (\$/pound)	Summary Stores Wtd Avg	
WHOLE BIRDS:									
Fresh - Hens	1.39 - 1.99	1,381 1.60		1.49 - 1.69	84 1.52		1.59 - 1.99	123 1.90	
" - Toms	1.39 - 1.99	877 1.66		1.59 - 1.69	23 1.60		1.59 - 1.99	123 1.90	
Frozen - Hens	0.89 - 1.69	975 1.06		0.99 - 1.69	1,184 1.19		0.88 - 1.49	314 1.12	
" - Toms	0.89 - 1.69	1,075 1.09		1.19 - 1.99	1,186 1.24		0.88 - 1.49	428 1.16	
PARTS:									
Breast:									
Bone-in, whole									
Fresh	2.39 - 3.49	415 2.89							
Frozen	0.98 - 2.99	1,303 1.97		1.49 - 1.99	1,578 1.81		0.99 - 1.99	857 1.51	
Split, bone-in									
Fresh							1.99	106 1.99	
Rotisserie							4.98	14 4.98	
Boneless, whole	4.99	18 4.99							
Cutlets	3.99 - 4.99	140 4.87		4.99	2 4.99		5.44	7 5.44	
Cutlets, thin sliced									
Strips									
Tenders	4.99	164 4.99		4.99	2 4.99		4.49 - 4.99	8 4.55	
Marinated Tenders	3.73 - 5.33	637 4.52							
Drumsticks	2.79	102 2.79					1.69 - 1.79	115 1.78	
Thighs									
Wings	1.69 - 2.99	162 2.70		1.69 - 2.99	19 2.85		1.69 - 1.79	115 1.78	
Necks									
Smoked Drumsticks	1.99 - 2.49	94 2.08							
Smoked Wings	1.99 - 2.79	165 2.33		1.99	9 1.99				
Smoked Necks	2.49	17 2.49		1.99	9 1.99				
GROUND TURKEY:									
Patties	3.49 - 3.99	633 3.78		3.99	1 3.99		3.50 - 3.99	188 3.52	
Sausage	3.19 - 3.99	1,062 3.60		3.99	1 3.99		3.27 - 4.69	133 3.86	
85% lean	2.29 - 3.19	516 2.77		2.39 - 2.99	1,086 2.43		2.29 - 3.29	291 2.65	
93% lean	3.07 - 3.84	894 3.32		3.07 - 3.75	93 3.27		3.33 - 3.99	183 3.49	
Breast (99-100% lean)	4.61 - 5.49	57 5.30					3.55 - 4.79	146 4.24	
Rolls (frsh/frz 1 lb.)	2.99 - 3.33	47 3.27		3.33	17 3.33		0.99 - 2.99	66 2.60	
Specialty ^{5/}									
Patties	5.00	84 5.00		5.00	42 5.00		5.00	8 5.00	
93-94% lean	4.49 - 5.00	98 4.93		5.00	42 5.00		3.50 - 5.00	29 3.91	
Breast	6.99	73 6.99							



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Fri. Mar 27, 2015

	SOUTH CENTRAL U.S. (AR,CO,KS,LA,MO,NM,OK,TX)			SOUTHWEST U.S. (AZ,CA,NV,UT)			NORTHWEST U.S. (ID,MT,OR,WA,WY)		
Feature Rate ^{1/}	18.7% of 4,900 sampled outlets			29.3% of 3,800 sampled outlets			51.9% of 1,300 sampled outlets		
Special Rate ^{4/}	0.0% of stores w/ no-price promotions			0.0% of stores w/ no-price promotions			7.9% of stores w/ no-price promotions		
Activity Index ^{2/}	Activity Index = 1,896			Activity Index = 1,997			Activity Index = 1,071		
	Price Range (\$/pound)	Summary Stores Wtd Avg		Price Range (\$/pound)	Summary Stores Wtd Avg		Price Range (\$/pound)	Summary Stores Wtd Avg	
WHOLE BIRDS:									
Fresh - Hens							1.69	18	1.69
" - Toms							1.69	18	1.69
Frozen - Hens	1.19	114	1.19						
" - Toms	1.19	114	1.19						
PARTS:									
Breast:									
Bone-in, whole									
Fresh							2.99	6	2.99
Frozen	0.99 - 1.79	424	1.39				1.49 - 1.69	72	1.49
Split, bone-in									
Fresh									
Rotisserie				7.99	107	7.99			
Boneless, whole									
Cutlets									
Cutlets, thin sliced									
Strips									
Tenders									
Marinated Tenders				3.99	48	3.99	3.99	16	3.99
Drumsticks									
Thighs									
Wings									
Necks									
Smoked Drumsticks									
Smoked Wings									
Smoked Necks									
GROUND TURKEY:									
Patties	2.39	37	2.39	2.39 - 3.49	87	2.54			
Sausage									
85% lean	2.39	21	2.39	1.99 - 2.50	310	2.21	2.39 - 3.19	74	2.44
93% lean	2.99 - 3.33	107	3.02	3.19 - 4.00	529	3.68	3.19 - 4.00	316	3.94
Breast (99-100% lean)	3.91	72	3.91				3.99	121	3.99
Rolls (frsh/frz 1 lb.)	1.99 - 2.79	309	2.25	2.99	167	2.99			
Specialty ^{5/}									
Patties	5.00	349	5.00	5.00	244	5.00	5.00	10	5.00
93-94% lean	5.00	349	5.00	4.99 - 5.00	505	5.00	3.99 - 5.00	420	4.71
Breast									



(prices in dollars per pound fresh unless otherwise noted; does not reflect all turkey items available in the marketplace)

	ALASKA (AK)			HAWAII (HI)		
Feature Rate ^{1/}	24.7% of 100 sampled outlets			45.1% of 100 sampled outlets		
Special Rate ^{4/}	0.0% of stores w/ no-price promotions			0.0% of stores w/ no-price promotions		
Activity Index ^{2/}	Activity Index = 38			Activity Index = 99		
	Price Range (\$/pound)	Summary Stores Wtd Avg		Price Range (\$/pound)	Summary Stores Wtd Avg	
WHOLE BIRDS:						
Fresh - Hens						
" - Toms						
Frozen - Hens				1.69	24	1.69
" - Toms				1.69	24	1.69
PARTS:						
Breast:						
Bone-in, whole						
Fresh						
Frozen	1.49	2	1.49			
Split, bone-in						
Fresh						
Rotisserie						
Boneless, whole						
Cutlets						
Cutlets, thin sliced						
Strips						
Tenders						
Marinated Tenders						
Drumsticks						
Thighs						
Wings						
Necks						
Smoked Drumsticks						
Smoked Wings						
Smoked Necks						
GROUND TURKEY:						
Patties						
Sausage						
85% lean						
93% lean	4.80	21	4.80	4.23 - 4.80	51	4.53
Breast (99-100% lean)	4.79	15	4.79			
Rolls (frsh/frz 1 lb.)						
Specialty ^{5/}						
Patties						
93-94% lean						
Breast						



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	NATIONAL SUMMARY						NORTHEAST U.S.			SOUTHEAST U.S.		
	This Week		Last Week		Last Year		(CT,DE,MA,MD,ME,NH,NJ,NY,PA,RI,VT)			(AL,FL,GA,MS,NC,SC,TN,VA,WV)		
Feature Rate ^{1/}	49.7% of 29,100 stores		63.1% of 29,100 stores		70.7% of 22,900 stores		67.7% of 5,500 sampled outlets			45.2% of 7,400 sampled outlets		
Activity Index 2/	40,553		52,216		44,630		Activity Index = 12,456			Activity Index = 8,843		
	Stores	Wtd Avg	Stores	Wtd Avg	Stores	Wtd Avg	Price Range (\$/pound)	Summary Stores	Summary Wtd Avg	Price Range (\$/pound)	Summary Stores	Summary Wtd Avg
SERVICE DELI - Turkey												
Category 1												
Processor Brand	3,916	8.04	4,821	8.48	4,730	8.18	5.99 - 9.99	1,775	8.29	6.99 - 9.99	166	8.29
Private Brand	1,486	7.68	2,021	8.16	1,230	8.26	6.99 - 8.99	700	7.44	5.99 - 8.49	11	6.44
Category 2												
Processor Brand	3,679	5.91	3,952	6.11	4,220	5.90	4.59 - 6.99	688	6.18	4.59 - 6.99	404	5.42
Private Brand	5,760	7.65	3,703	6.60	7,790	6.05	4.99 - 7.99	2,160	7.77	6.99 - 7.99	245	7.33
Category 3												
Processor Brand	1,399	4.03	463	4.51	1,950	4.17	3.49 - 5.49	385	4.01	3.99 - 4.38	68	4.37
Private Brand	1,180	4.99	504	4.16	1,350	4.84	4.97 - 4.99	175	4.99	4.99	1,002	4.99
Turkey Ham												
Processor Brand	380	3.81	395	3.75	270	3.22	2.99 - 4.99	81	4.40	4.99	2	4.99
Private Brand	45	4.48					4.48	45	4.48			
Turkey Pastrami												
Processor Brand	191	6.58	490	4.16	440	3.88	6.99	137	6.99			
Private Brand												
SERVICE DELI - Chicken												
Category 1												
Processor Brand	1,723	7.90	4,622	7.58	1,720	7.39	5.99 - 9.99	420	8.64	9.49	87	9.49
Private Brand	3,014	7.36	3,378	7.99	1,920	7.68	5.97 - 7.99	2,565	7.41	6.99	126	6.99
Category 2												
Processor Brand	309	5.75	238	5.31	220	4.95						
Private Brand	1,355	5.16	147	6.00	1,110	4.99	4.99	110	4.99	4.99	1,011	4.99
SELF-SERVICE DELI												
(dollars per tub or pouch)												
Turkey 7-10 oz												
Processor Brand	6,008	3.51	7,080	3.44	7,120	3.06	2.50 - 4.49	1,506	3.18	2.50 - 4.49	1,822	3.53
Private Brand	921	3.35	6,387	3.15	930	3.20	3.19 - 3.50	261	3.31	2.99 - 3.50	16	3.05
Turkey 16 oz												
Processor Brand	1,753	5.13	643	5.45	2,030	4.18	4.99 - 6.49	126	5.18	4.99	1,002	4.99
Private Brand	1,083	4.50	95	6.99						4.50	1,083	4.50
Chicken 7-10 oz												
Processor Brand	5,430	3.59	6,889	3.45	6,710	3.07	2.49 - 4.49	1,061	3.34	2.50 - 4.49	1,782	3.55
Private Brand	921	3.40	6,388	3.15	890	3.23	3.49 - 3.50	261	3.49	2.99 - 3.50	16	3.05

Category 1: composed of 1-3 whole breast lobes using no binders. (slicing)

Category 2: composed of multiple (5-7) whole or partial breast muscles; sectioned and formed with minimal binders. (thin slicing)

Category 3: composed of multiple muscle pieces chopped and reformed into desired shape. (shaving)



USDA National Retail Report - Turkey

Fri. Mar 27, 2015

Advertised Prices for Poultry Deli Meats to Consumers at Major Retail Supermarket Outlets during the period of 03/27 thru 04/02.

(prices in dollars per pound unless otherwise noted; does not reflect all poultry items available in the marketplace)

	MIDWEST U.S. (IA,IL,IN,KY,MI,MN,ND,NE,OH,SD,WI)			SOUTH CENTRAL U.S. (AR,AZ,CO,KS,LA,MO,NM,OK,TX,UT)			SOUTHWEST U.S. (CA,HI,NV)			NORTHWEST U.S. (AK,ID,MT,OR,WA,WY)		
Feature Rate ^{1/}	42.1% of 6,100 sampled outlets			46.3% of 4,900 sampled outlets			43.2% of 3,800 sampled outlets			66.0% of 1,300 sampled outlets		
Activity Index 2/	Activity Index = 6,634			Activity Index = 5,048			Activity Index = 4,506			Activity Index = 2,770		
	Price Range (\$/pound)	Summary Stores Wtd Avg		Price Range (\$/pound)	Summary Stores Wtd Avg		Price Range (\$/pound)	Summary Stores Wtd Avg		Price Range (\$/pound)	Summary Stores Wtd Avg	
SERVICE DELI - Turkey												
Category 1												
Processor Brand	5.99 - 9.99	598 7.86		5.99 - 11.05	306 7.35		5.99 - 9.99	657 7.91		5.99 - 9.99	380 7.88	
Private Brand	6.99 - 9.99	185 8.17		6.99 - 8.99	570 7.83					7.99	20 7.99	
Category 2												
Processor Brand	4.59 - 6.99	1,301 5.92		4.98 - 4.99	805 5.55		4.99 - 6.99	185 6.81		4.49 - 6.99	291 6.34	
Private Brand	4.98 - 6.99	510 6.42		5.99 - 7.99	679 7.11		7.49 - 7.99	1,358 7.99		7.49 - 7.99	701 7.90	
Category 3												
Processor Brand	3.48 - 4.38	168 4.01		3.99 - 4.38	187 4.03		2.99 - 4.99	433 3.99		3.48 - 4.99	158 4.08	
Private Brand	4.99	3 4.99										
Turkey Ham												
Processor Brand	2.99 - 5.99	29 3.98		2.59 - 3.99	60 3.21		2.99 - 4.49	208 3.71				
Private Brand												
Turkey Pastrami												
Processor Brand	4.79 - 7.59	41 6.05		3.99	13 3.99							
Private Brand												
SERVICE DELI - Chicken												
Category 1												
Processor Brand	5.99 - 9.99	328 7.30		5.99 - 6.99	400 6.85		5.99 - 12.99	347 8.41		5.99 - 9.99	141 7.90	
Private Brand	6.59 - 8.49	246 6.98		6.99 - 8.49	77 7.44							
Category 2												
Processor Brand	3.99 - 5.99	309 5.75										
Private Brand	4.99 - 5.99	194 5.97		5.99	40 5.99							
SELF-SERVICE DELI												
(dollars per tub or pouch)												
Turkey 7-10 oz												
Processor Brand	1.91 - 4.49	1,056 2.95		1.99 - 3.29	706 3.77		3.99 - 4.49	492 4.49		2.78 - 4.49	354 4.33	
Private Brand	3.00 - 3.50	224 3.25		2.99	82 2.99		3.49	167 3.49		3.00 - 3.99	171 3.61	
Turkey 16 oz												
Processor Brand	4.99 - 5.99	219 5.11		4.49 - 5.99	371 5.42					5.99	29 5.99	
Private Brand												
Chicken 7-10 oz												
Processor Brand	1.91 - 4.49	999 2.97		2.49 - 3.29	670 3.86		3.99 - 4.49	492 4.49		2.78 - 4.49	354 4.33	
Private Brand	3.00 - 3.50	224 3.25		2.99	82 2.99		3.49	167 3.49		3.00 - 3.99	171 3.61	

Category 1: composed of 1-3 whole breast lobes using no binders. (slicing)

Category 2: composed of multiple (5-7) whole or partial breast muscles; sectioned and formed with minimal binders. (thin slicing)

Category 3: composed of multiple muscle pieces chopped and reformed into desired shape. (shaving)

Source: USDA Agricultural Marketing Service, Livestock, Poultry & Seed Market News - (515) 284-4460 <http://www.ams.usda.gov/LPSMarketNewsPage>



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	ALASKA (AK)			HAWAII (HI)				
Feature Rate ^{1/}	40.9% of 100 sampled outlets			75.2% of 100 sampled outlets				
Activity Index 2/	Activity Index = 106			Activity Index = 190				
	Price Range (\$/pound)	Summary Stores Wtd Avg		Price Range (\$/pound)	Summary Stores Wtd Avg			
SERVICE DELI - Turkey								
Category 1								
Processor Brand				7.49	34 7.49			
Private Brand								
Category 2								
Processor Brand	4.49	5 4.49						
Private Brand	8.49 - 8.99	53 8.89		9.99	54 9.99			
Category 3								
Processor Brand								
Private Brand								
Turkey Ham								
Processor Brand								
Private Brand								
Turkey Pastrami								
Processor Brand								
Private Brand								
SERVICE DELI - Chicken								
Category 1								
Processor Brand								
Private Brand								
Category 2								
Processor Brand								
Private Brand								
SELF-SERVICE DELI (dollars per tub or pouch)								
Turkey 7-10 oz								
Processor Brand	5.49	21 5.49		3.49 - 5.49	51 4.55			
Private Brand								
Turkey 16 oz								
Processor Brand	5.99 - 6.39	6 6.32						
Private Brand								
Chicken 7-10 oz								
Processor Brand	5.49	21 5.49		3.49 - 5.49	51 4.55			
Private Brand								

Category 1: composed of 1-3 whole breast lobes using no binders. (slicing)

Category 2: composed of multiple (5-7) whole or partial breast muscles; sectioned and formed with minimal binders. (thin slicing)

Category 3: composed of multiple muscle pieces chopped and reformed into desired shape. (shaving)